

Checklist for Preparing Your Income Tax Return

This list is not necessarily complete, but should cover most of the needed information

A copy of last year's return

Birthdays of individuals on return.

Social Security 1099 forms

Pension 1099 forms

Dividend and Interest 1099s

This includes Bank and Brokerage 1099s

Any W-2's or 1099-Misc forms

Medical expenses

Premiums

Long Term Premiums

Nursing Home Costs

Doctor Bills

Dentist Bills

Eyecare expense

Remember that you are including only that expense not reimbursed by an insurance carrier. You actually paid this out and received no reimbursement back.

Real Estate Taxes

State Income Taxes (You should include the refund amount from last year if you received one) Estimate payments

for Federal and State income Taxes

State Sales Tax (This is good for 2008 and 2009 and only on major items.)

Charitable contributions both in cash and items donated.

Detail on the items donated should include the charity and the dates donated as well as how many bags or boxes donated.

Investment and legal expenses paid

Tax preparation fees

If you had securities from brokers and sold any items, a copy of the broker statement (Year end report)

This will get a start on the preparation process and we will call if there are any questions.

Call us if you have any questions about this form.

Timothy T. Fullerton, Sr.